Training Week 4 - Case Scenario- Practice Admin User Role

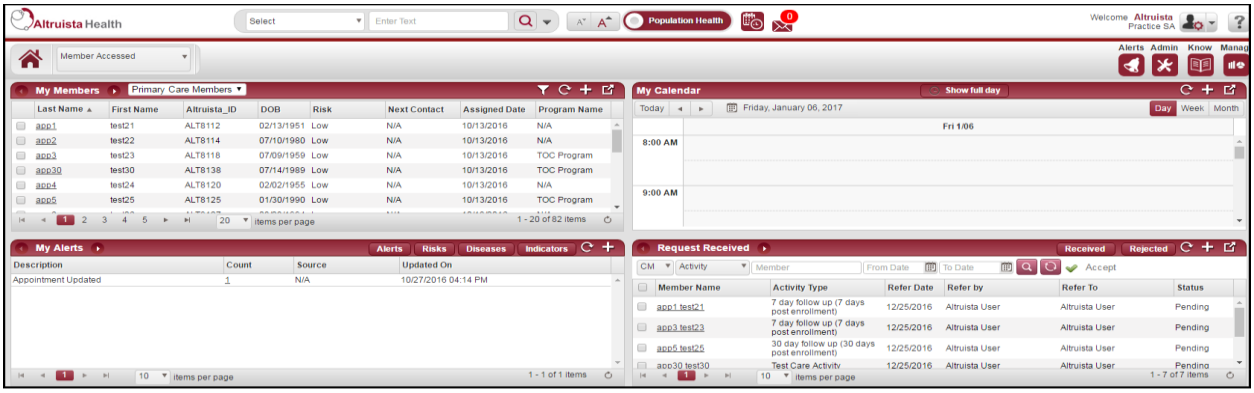
The fourth week of Care Coordination Tool training will focus on the Practice Admin User Role in the Care Continuity Tool.

After this self-guided training, you should be able to perform the following functions:

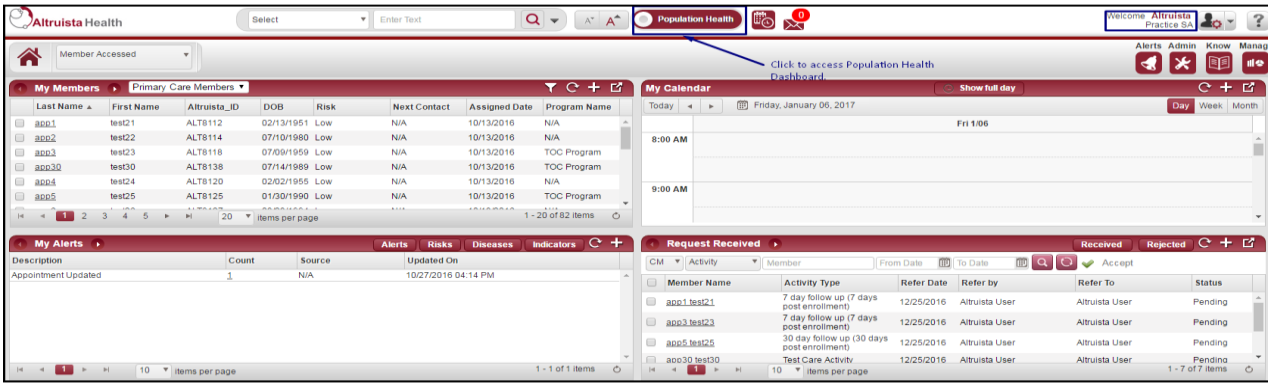
1. View Care Coordination and Population Health Provider dashboard.
2. View and Edit Member Summary Data
3. Update or Inactivate Care Staff Users
4. Manage Care Staff
5. Reset Password
6. Assign Member's Care Team

1. View Care Coordination and Population Health Provider Dashboards

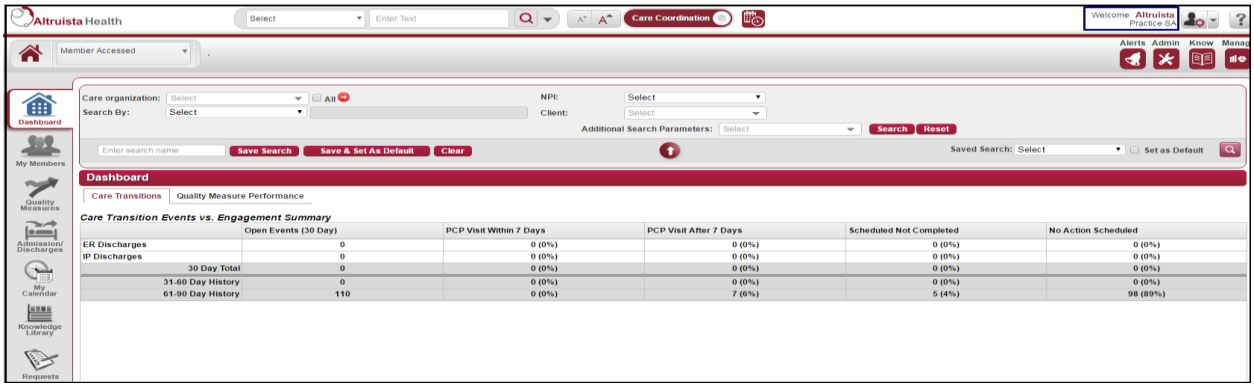
When a **Practice Admin** logs in to the Care Coordination Tool, the dashboard page appears as shown below.



The Practice Admin can select the Population Health Dashboard by clicking on the **Population Health toggle button.**



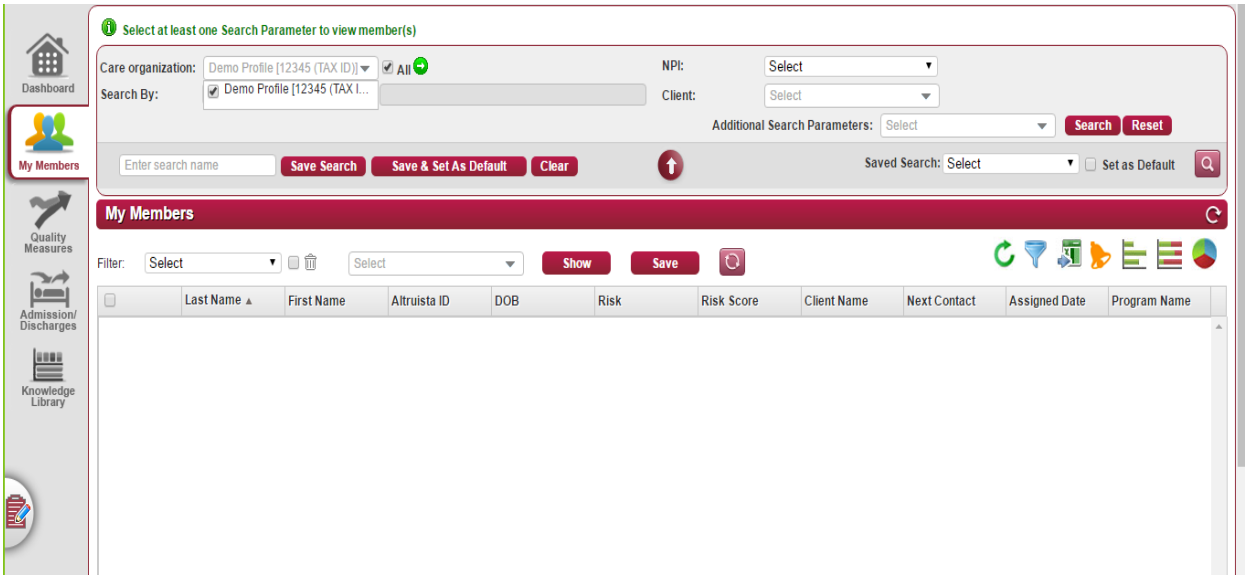
Clicking on the Population Health toggle button will land the Practice Admin on the Population Health Provider dashboard.

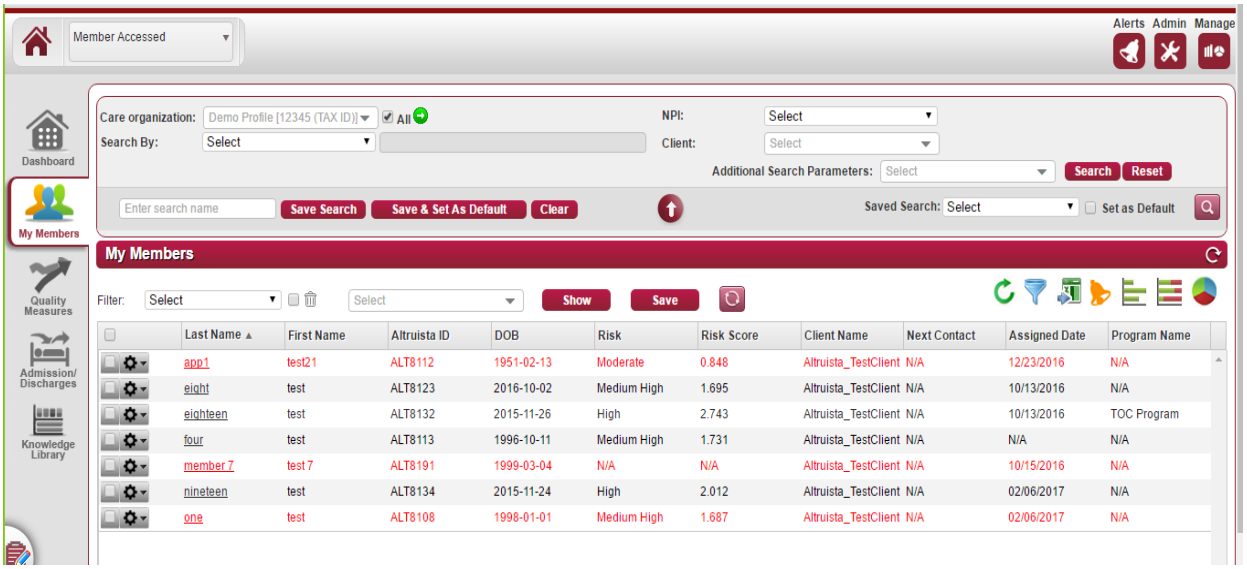


2. View and Edit Member Summary Data

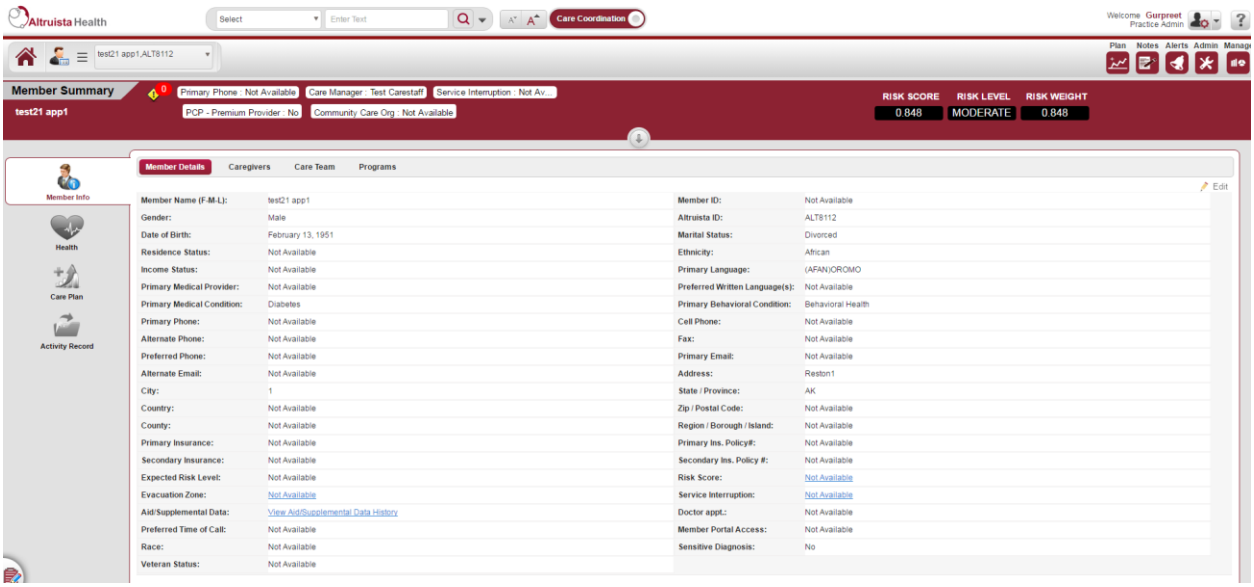
The Practice Admin can view member's data associated to the Practice TIN(s) for which they have access.

In Global Search, **select a Practice TIN** from the Care Organization drop-down, and click on the **Search Icon** to view members that are associated to the TIN.





Click on Member's Last Name Hyperlink to view the member's data, in the **Member Summary** section.



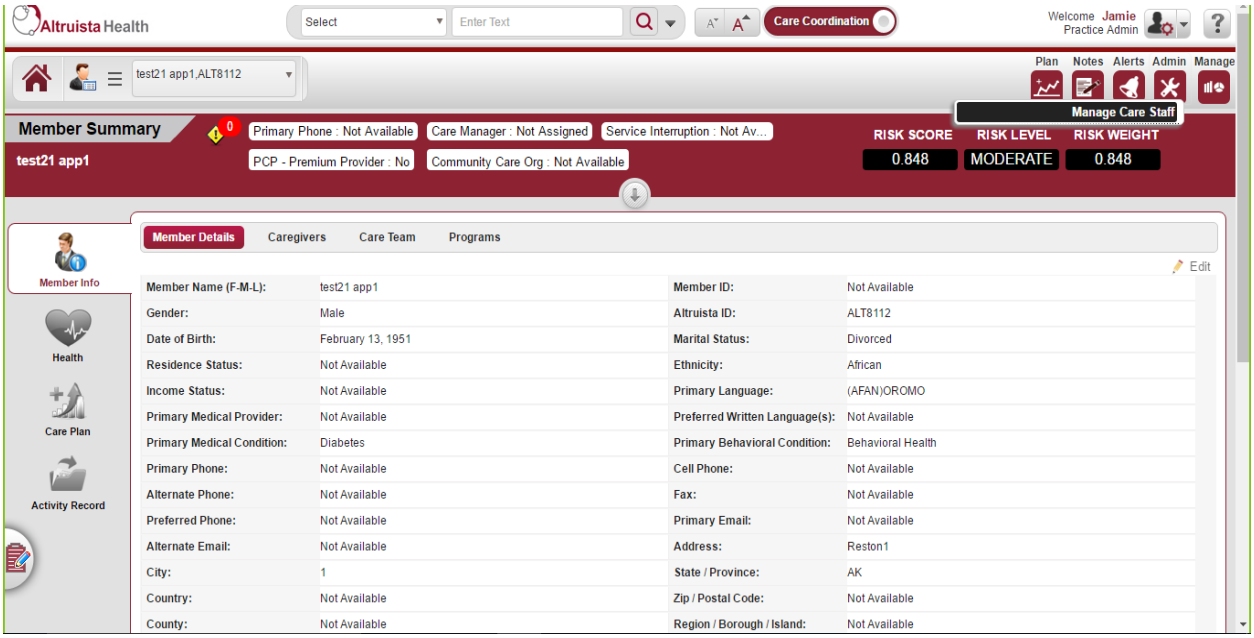
In the "Member Summary" section the Practice Admin can view and also edit member's demographic and medical information by clicking the **Edit** button.

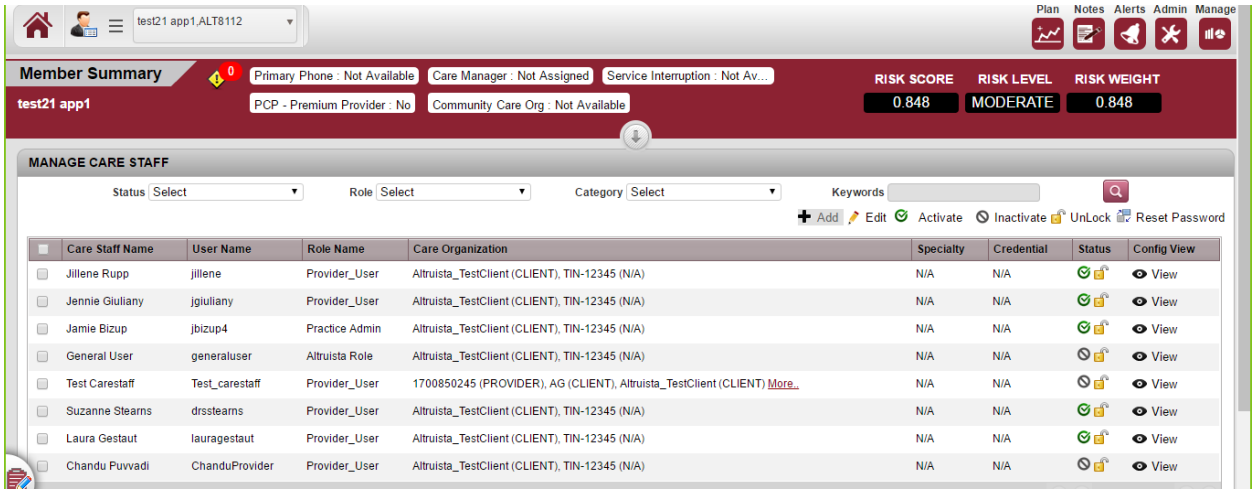
3. Manage Care Staff

Note: *The Practice Admin will not be able to search or view any Member data which that is not within the TIN(s), where the Practice Admin has access.*

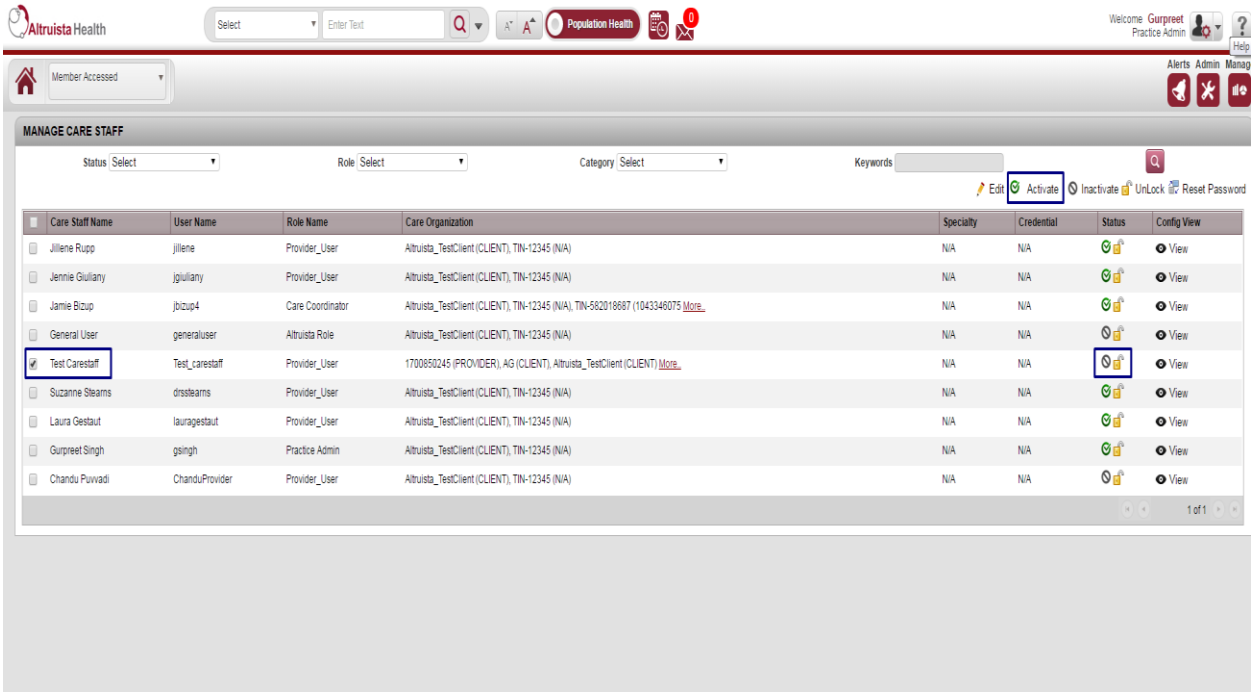
The Practice Admin can update/inactivate care staff user(s) assigned to their practice where the Practice Admin has access.

Click on the **Admin icon** and select **Manage Care Staff** from the drop-down menu.

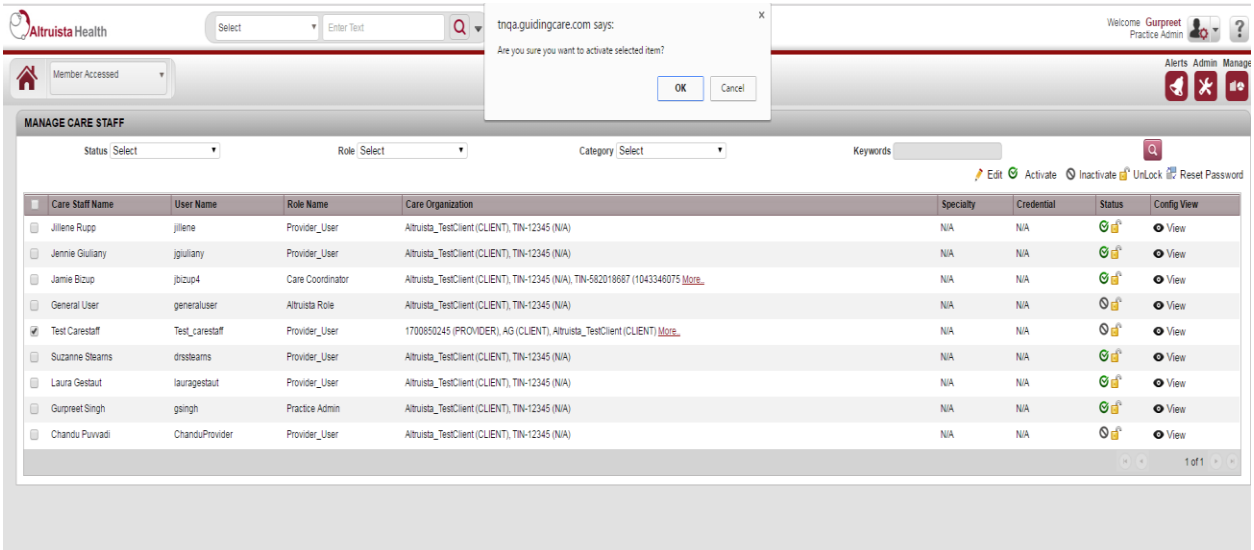


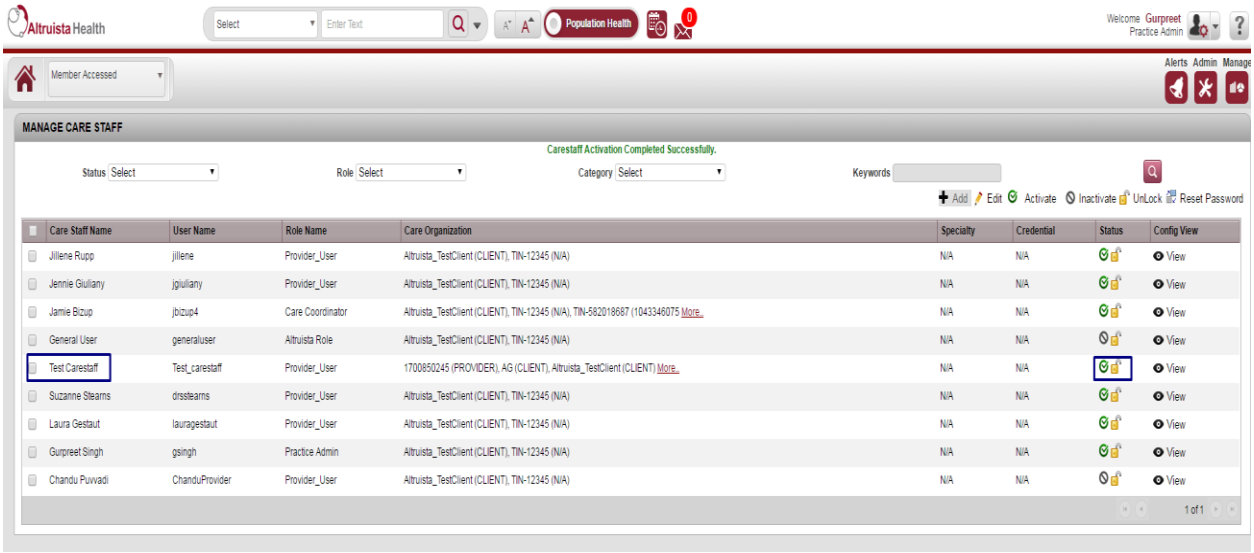


In Manage Care Staff panel, select a care staff member and click on **Activate icon** to change the status from Inactive to Active of the Care Staff member.



After Clicking on the **Activate icon**, the status of the Care Staff Member is updated from Inactive to Active.



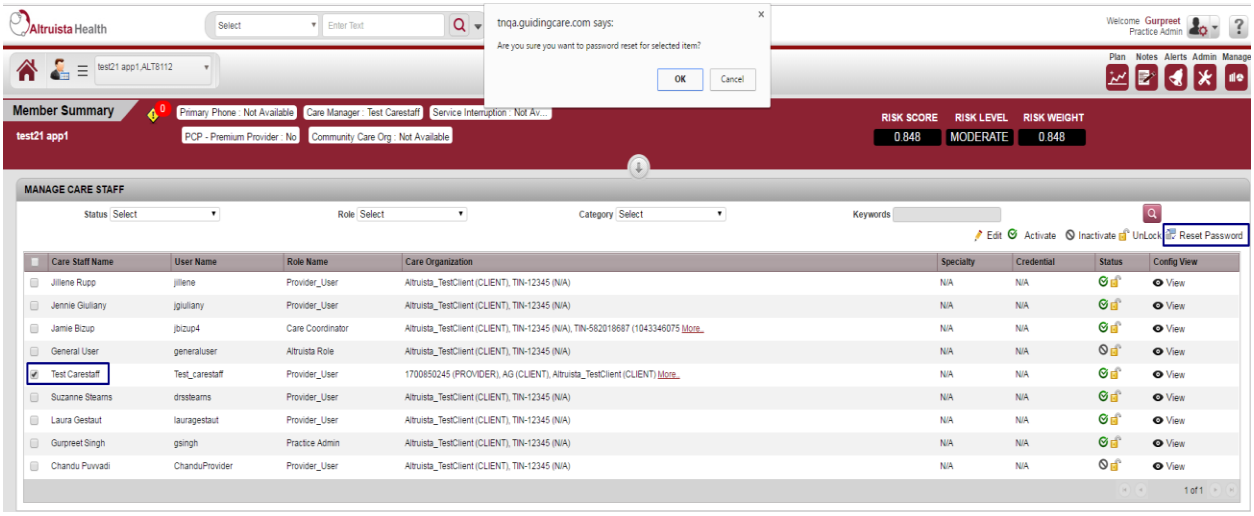


Note: *The Practice Admin can change the status of a Care Staff member from Active to Inactive by following the same steps shown above in the screenshots and clicking on the Inactive icon.*

Reset Password

In Manage Care Staff, the Practice Admin Can Reset the Care Staff password.

Select a Care Staff Member name and click the **Reset Password icon**.



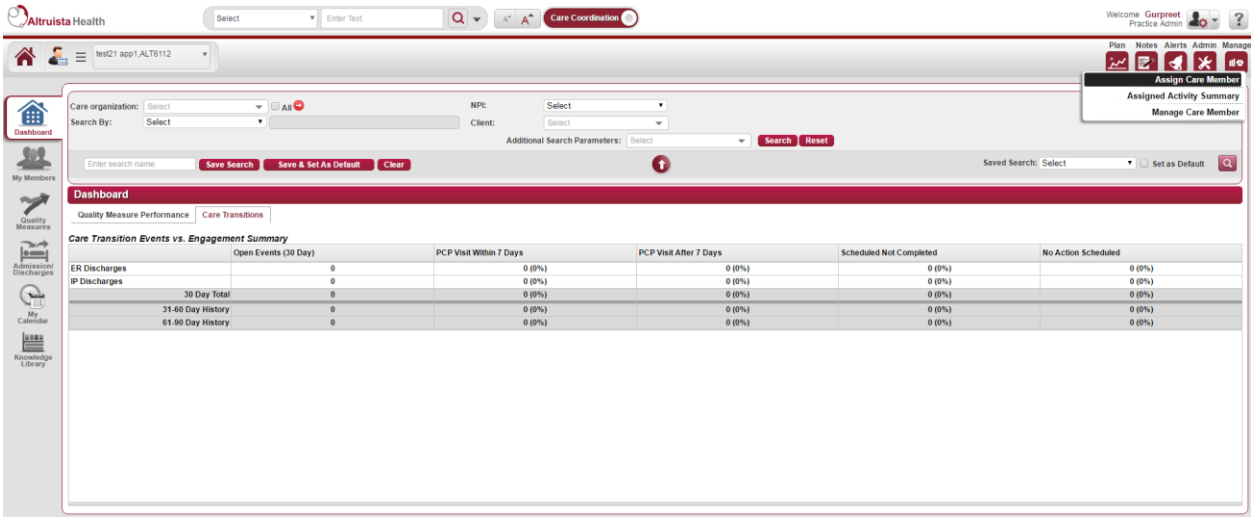
Note: *If a care staff has locked themselves out of their account the practice admin will need to first click the check box beside their name and choose the unlock button. Then they will be able to activate the account by following the steps above.*

Assign Member's Care Team

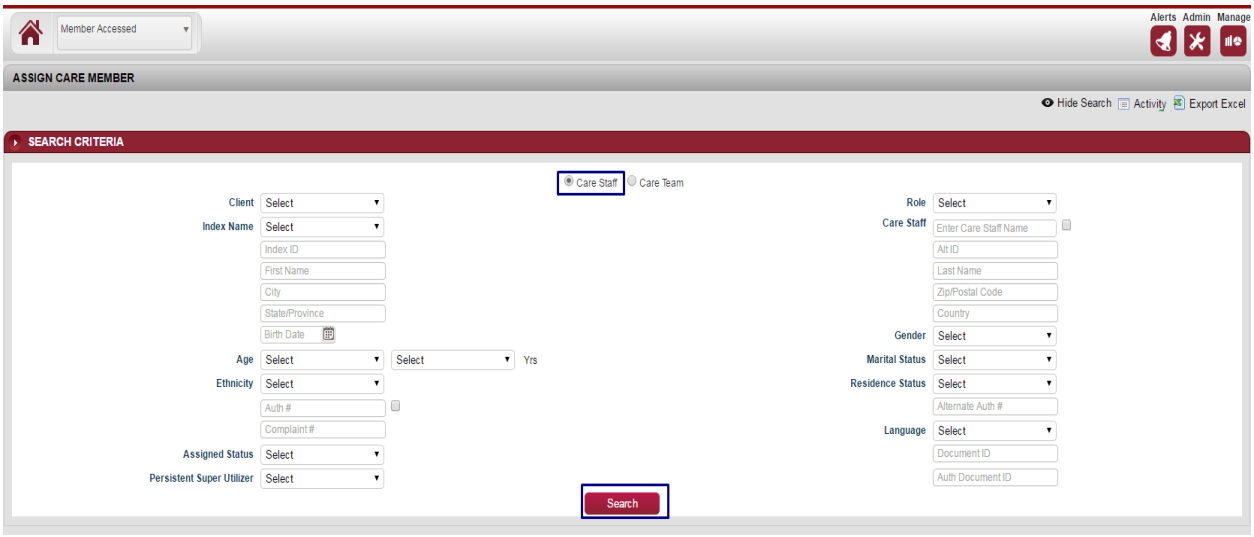
The Practice Admin can assign/re-assign Care Coordinator and Care Team Managers to a Member's Care Team.

Click on the Mange Icon

and select **Assign Care Member** from the drop-down menu.

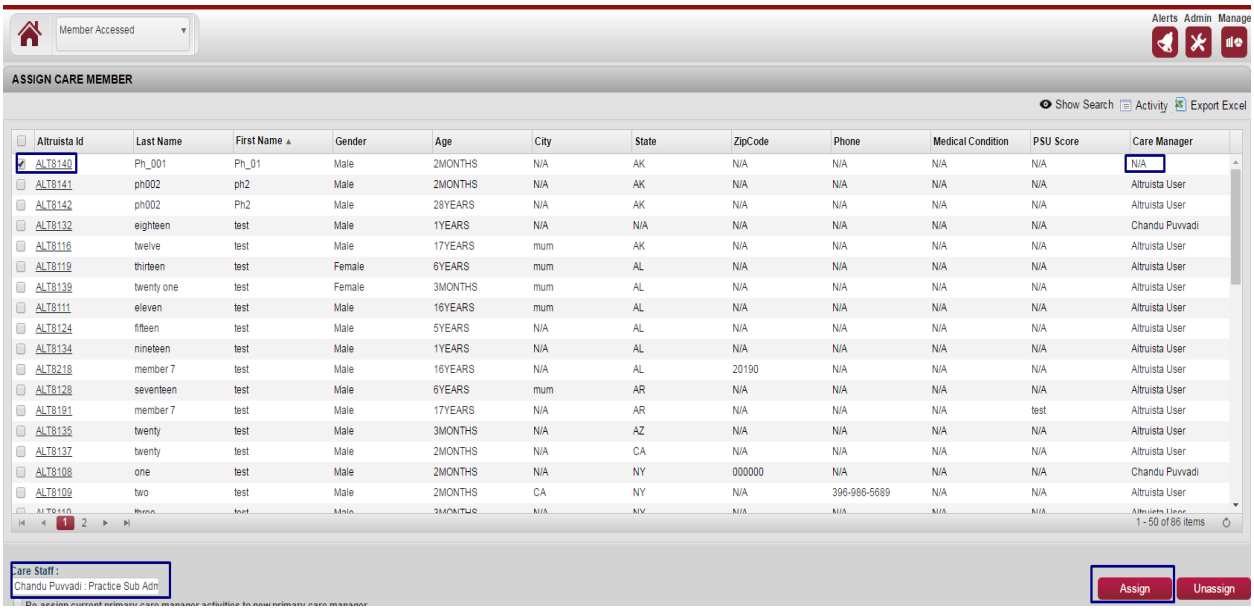


In Assign Care Member panel, Select **Care Staff radio button** and click on search.

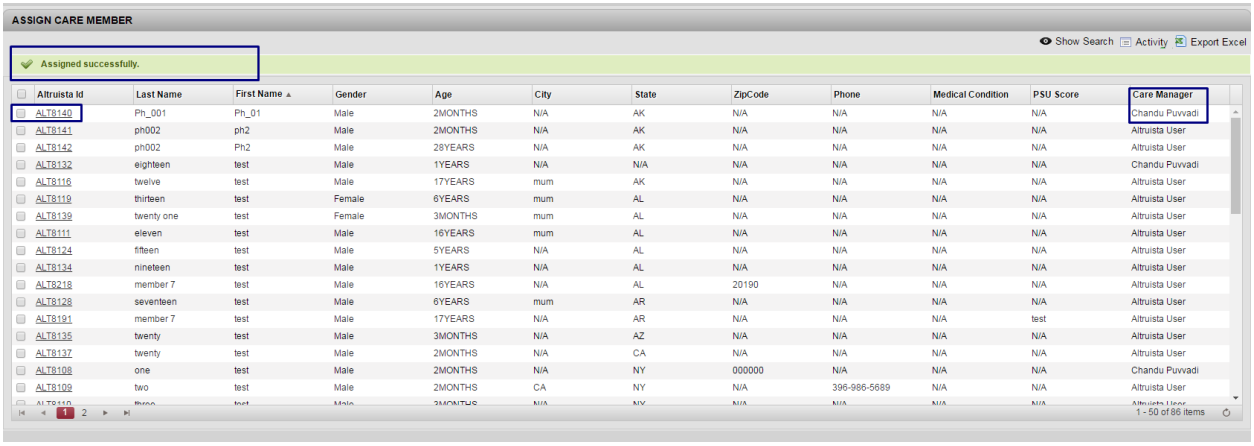


In the example screenshot shown below, the member selected currently is not assigned a Care Manager.

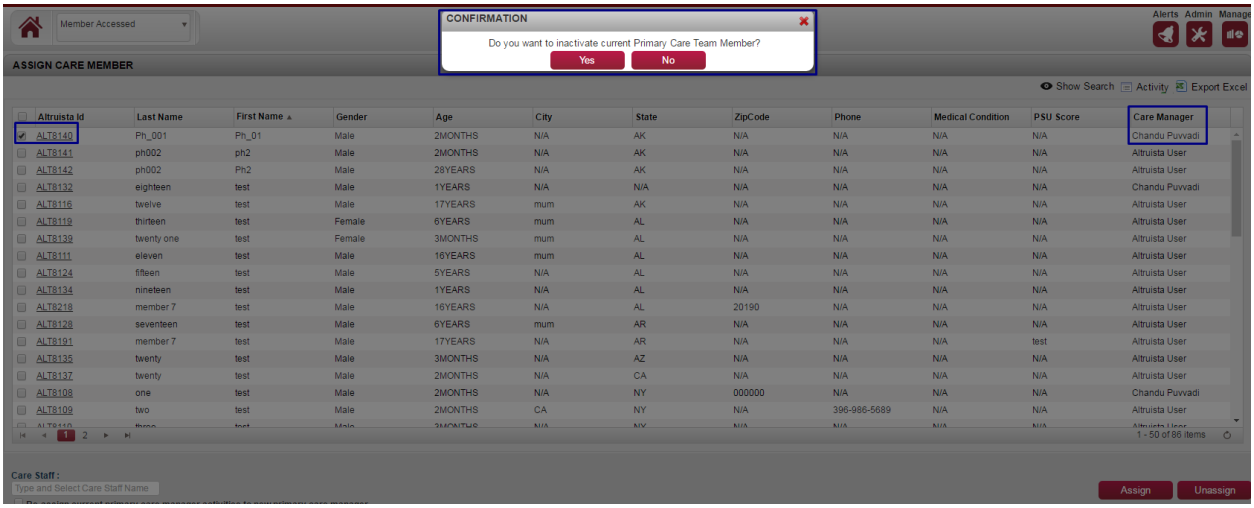
To assign a Care Manager, select the member by **clicking on the checkbox** next to Altruista ID, and enter the name of the Care staff member.

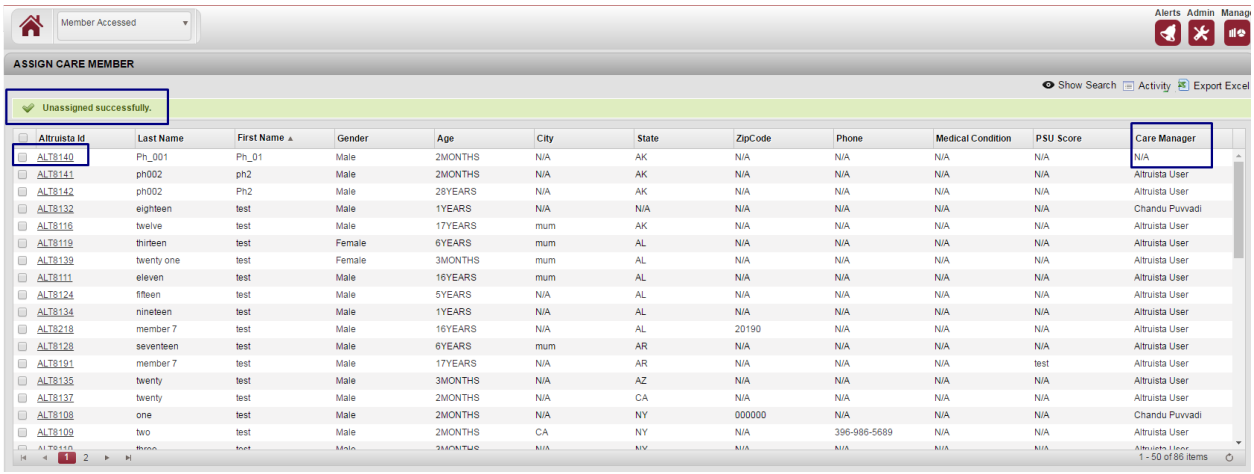


After clicking on the **Assign button**, the Practice SA assigned Care Manger Chandu Puvvadi to the member:



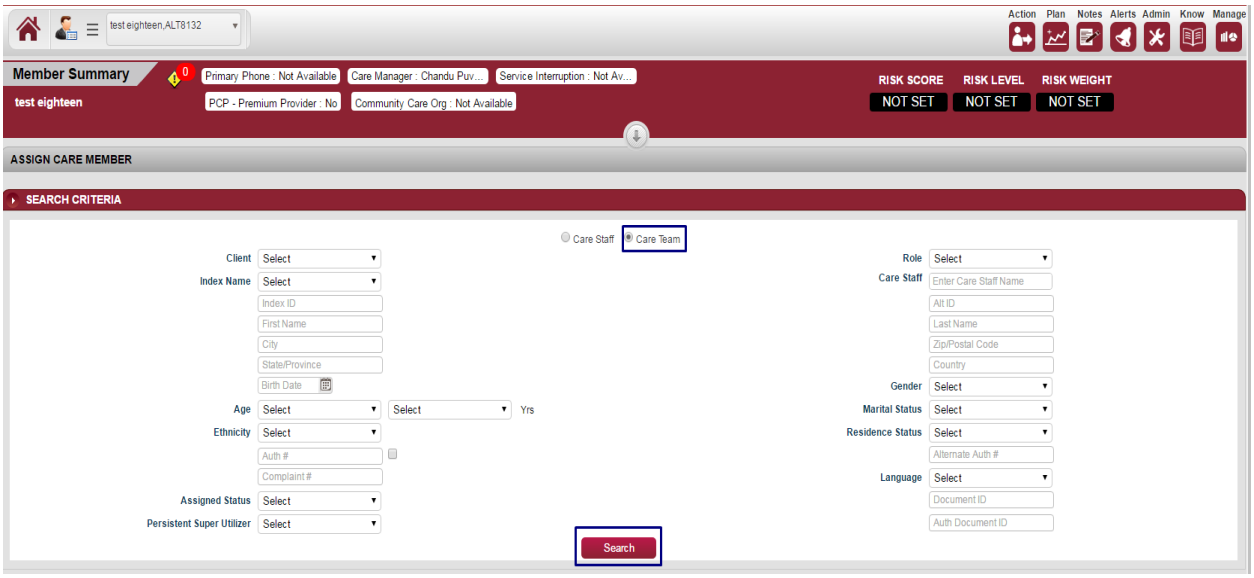
To unassign Care Manager Chandu Puvvadi, select the same member, and click on the **"Unassign"** icon.





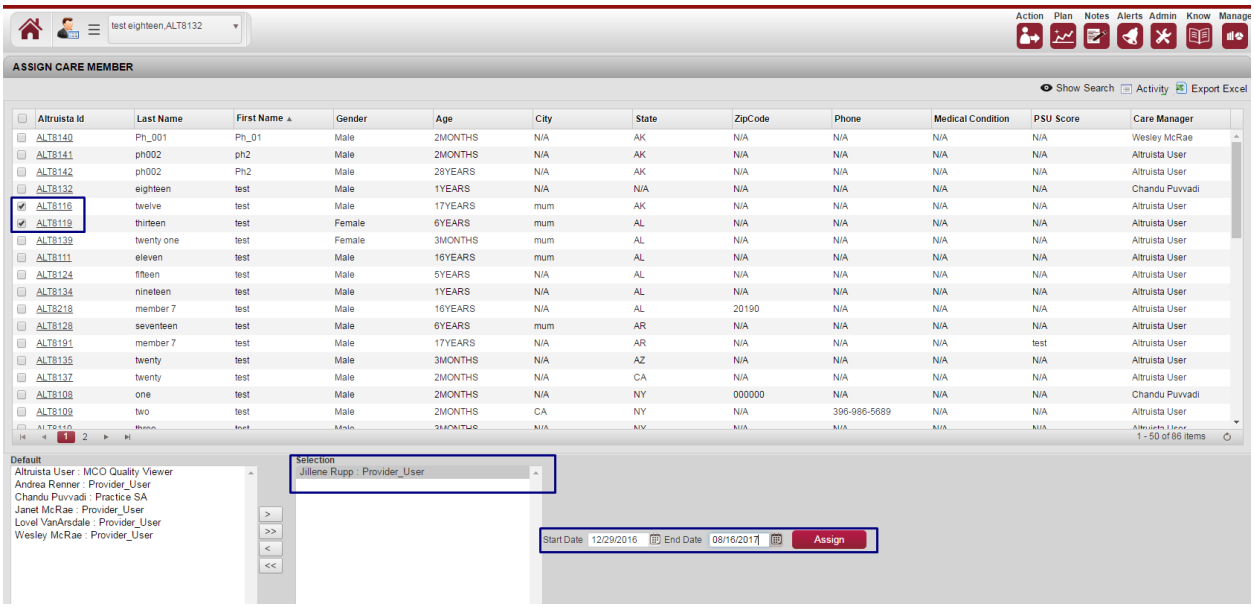
The Practice Admin can group Member's together and assign to the Care Coordinator or Care Team.

In the Assign Care Member section, select the **Care Team radio button**, and click on **Search** to filter members.

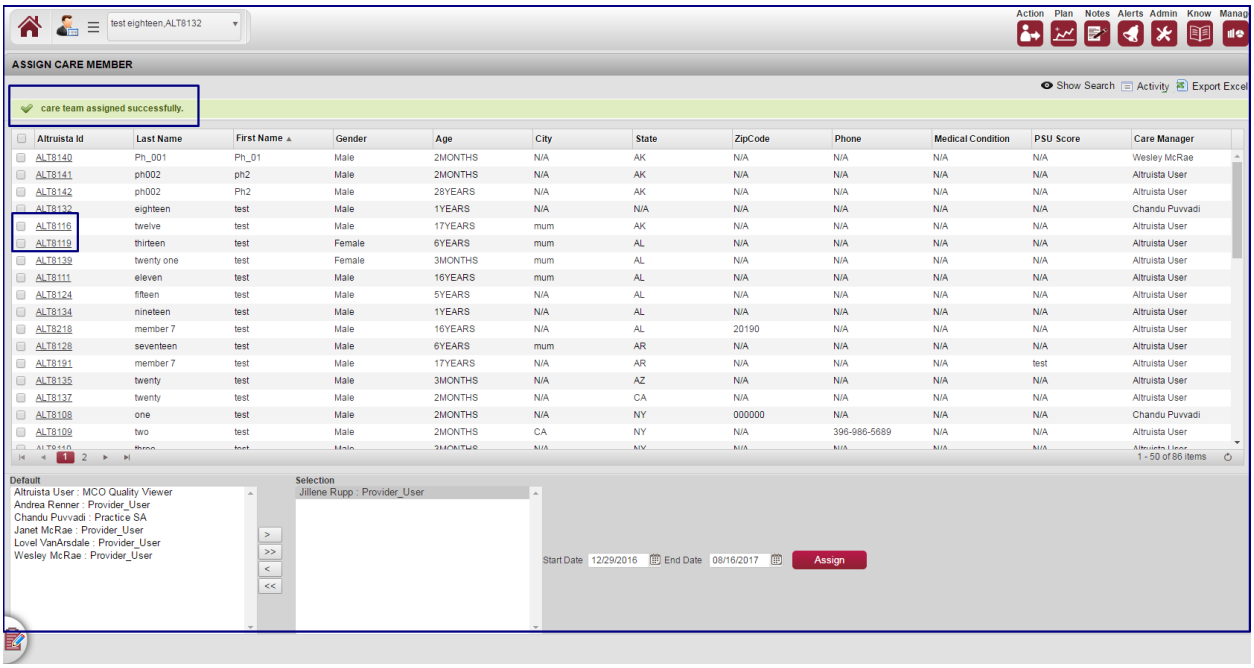


Select a Member or Members (you can multi-select and group members together) to assign a Care Coordinator to the members Care Team.

In this example below, the Practice Admin has selected Care Coordinator Jillene Rupp from 12/29/2016 to 08/16/2017.



Click on the "**Assign**" button, and now the Care Coordinator Jillene Rupp is assigned to the Care Team of the selected members.


test eighteen,ALT8132
Action Plan Notes Alerts Admin Know Manag
ASSIGN CARE MEMBER
Show Search Activity Export Excel
care team assigned successfully.
Altruista Id | Last Name | First Name | Gender | Age | City | State | ZipCode | Phone | Medical Condition | PSU Score | Care Manager
ALT8140 | Ph_001 | Ph_01 | Male | 2MONTHS | N/A | AK | N/A | N/A | N/A | N/A | Wesley McRae
ALT8141 | ph002 | ph2 | Male | 2MONTHS | N/A | AK | N/A | N/A | N/A | N/A | Altruista User
ALT8142 | ph002 | Ph2 | Male | 28YEARS | N/A | AK | N/A | N/A | N/A | N/A | Altruista User
ALT8132 | eighteen | test | Male | 1YEARS | N/A | N/A | N/A | N/A | N/A | N/A | Chandu Puvvadi
ALT8116 | twelve | test | Male | 17YEARS | mum | AK | N/A | N/A | N/A | N/A | Altruista User
ALT8119 | thirteen | test | Female | 6YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User
ALT8139 | twenty one | test | Female | 3MONTHS | mum | AL | N/A | N/A | N/A | N/A | Altruista User
ALT8111 | eleven | test | Male | 16YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User
ALT8124 | fifteen | test | Male | 5YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User
ALT8134 | nineteen | test | Male | 1YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User
ALT8218 | member 7 | test | Male | 16YEARS | N/A | AL | 20190 | N/A | N/A | N/A | Altruista User
ALT8128 | seventeen | test | Male | 6YEARS | mum | AR | N/A | N/A | N/A | N/A | Altruista User
ALT8191 | member 7 | test | Male | 17YEARS | N/A | AR | N/A | N/A | N/A | test | Altruista User
ALT8135 | twenty | test | Male | 3MONTHS | N/A | AZ | N/A | N/A | N/A | N/A | Altruista User
ALT8137 | twenty | test | Male | 2MONTHS | N/A | CA | N/A | N/A | N/A | N/A | Altruista User
ALT8108 | one | test | Male | 2MONTHS | N/A | NY | 000000 | N/A | N/A | N/A | Chandu Puvvadi
ALT8109 | two | test | Male | 2MONTHS | CA | NY | N/A | 396-986-5689 | N/A | N/A | Altruista User
1 2
1 - 50 of 86 items
Default
Altruista User : MCO Quality Viewer
Andrea Renner : Provider_User
Chandu Puvvadi : Practice SA
Janet McRae : Provider_User
Lovel VanArsdale : Provider_User
Wesley McRae : Provider_User
> >> < <<
Selection
Jillene Rupp : Provider_User
Start Date 12/29/2016 End Date 08/16/2017
Assign